



Perpetual Select Super Plan

Perpetual Superannuation Limited ABN 84 008 416 831 AFSL 225246 RSE L0003315
Perpetual's Select Superannuation Fund ABN 51 068 260 563 RSE R1057034

Application for additional investment and features

Please complete this form using BLACK INK and print well within the boxes in CAPITAL LETTERS. Mark appropriate boxes with a cross like the following . Start at the left of each answer space and leave a gap between words.

1. Investor details (must be completed)

client number	<input type="text"/>	account number	<input type="text"/>
investor name	<input type="text"/>		

2. Payment details (must be completed)

How will the contribution be made? NOTE: Cash is not accepted.

by direct debit	<input type="checkbox"/>	we will debit your bank account nominated in section 5 as bank account 1. I acknowledge and accept the terms and conditions of direct debit as explained in the Direct Debit Request Service Agreement which is available by following the links to downloading the PDS from www.perpetual.com.au/select-super-updates.aspx .
by cheque	<input type="checkbox"/>	make cheque payable to PIML – Select Super – [insert name of applicant]
by rollover	<input type="checkbox"/>	make sure you complete and send a 'Transfer authority' form to your current superannuation provider

3. Contribution/rollover details

Please indicate below the amount of your contributions and/or rollover (as applicable). Please ensure that your previous superannuation provider has been instructed to rollover your funds.

Contribution Limit Reminder An annual limit of \$25,000 applies to concessional contributions and generally \$150,000 for after-tax contributions. For people aged 50 and above or turning 50 between 1 July 2007 and 30 June 2012 deductible contributions of \$50,000 may be made each year. Members under age 65 can make after-tax contributions totalling \$450,000 in a financial year provided no such contributions are made in the following two years. You should speak to your financial adviser about these limits when considering your situation. Contributions made in excess of the above limits will effectively be taxed at the highest marginal rate.

Initial one-off contributions

Contribution type	Amount	Further details
personal contribution	\$	If you are eligible and intend to claim a tax deduction on these contributions you will also need to complete section 4.
employer contribution (including salary sacrifice contributions)	\$	
spouse contribution	\$	
CGT contribution	\$	You will also need to include a completed CGT cap election form (available from the ATO).
personal injury payment	\$	You will also need to include a completed contribution for personal injury form (available from the ATO).
Total	\$	

Rollovers

If you are transferring from another super fund please provide the below details. You will also need to complete the 'Transfer authority' form from our website (www.perpetual.com.au/forms-investors-superannuation.aspx), for each rollover being requested and send it to your previous superannuation provider.

Name of the previous institution	Policy /Account number	Approximate amount
		\$
		\$
		\$
		\$
		\$
Total		\$

Savings plan

Only complete this section if you would like to establish a savings plan to make regular contributions from a nominated bank account. You will also need to nominate a bank account in section 5, from which contributions will be deducted under the savings plan.

<p>Contribution type If you are eligible and intend to claim a tax deduction on your Personal Contributions you will need to complete section 4.</p>	<p>personal <input type="checkbox"/></p> <p>employer <input type="checkbox"/></p> <p>salary sacrifice <input type="checkbox"/></p> <p>spouse <input type="checkbox"/></p>
<p>Amount</p>	<p>\$</p>
<p>Frequency</p>	<p>monthly (default) <input type="checkbox"/></p> <p>quarterly <input type="checkbox"/></p>
<p>Day</p>	<p>10th <input type="checkbox"/></p> <p>20th <input type="checkbox"/></p>

4. Tax deduction for personal contributions (individual members)

Tax deduction for your personal contributions (including one-off and savings plan contributions)

I am eligible and intend to claim a tax deduction for my personal contributions of:

\$ (one-off contribution)

\$ (per each savings plan amount)

This is your notice to us, to be effective from the later of the date of this application or the date that you become a member of the Super Plan, of the amount you intend to claim as a tax deduction in relation to Section 290-170 of the Income Tax Assessment Act 1997. We will deduct 15% contributions tax from this amount. This notice will be applicable for the current and future financial years (for contributions made under the savings plan) unless you notify us in writing of your intention to vary this notice. We will send you an acknowledgement of the amount you wish to claim as a tax deduction which you will need to retain for tax purposes for the current and future financial years (for contributions made under the savings plan).

5. Bank account details (if applicable)

By providing your bank account details in this section, you authorise Perpetual to use these details for all future transaction requests that you nominate.

Bank account 1	Bank account 2
Complete your bank account details in this section and indicate what you would like us to use these bank account details for	Only complete your account details in this section if you would like us to debit a different bank account for your savings plan
<input type="checkbox"/> applications	
<input type="checkbox"/> savings plan	
<input type="checkbox"/> withdrawals	
financial institution	financial institution
branch	branch
BSB <input type="text"/> - <input type="text"/> account number <input type="text"/>	BSB <input type="text"/> - <input type="text"/> account number <input type="text"/>
account name	account name
signature of account holder A	signature of account holder A
signature of account holder B	signature of account holder B
date <input type="text"/> / <input type="text"/> / <input type="text"/>	date <input type="text"/> / <input type="text"/> / <input type="text"/>

I request and authorise Perpetual Investment Management Limited, Debit User Identification Number 187310 to arrange for any amount Perpetual Investment Management Limited may debit or charge me to be debited through the Bulk Electronic Clearing System from an account held at the financial institution identified above, subject to the terms and conditions of the Direct Debit Request Service Agreement which is available from www.perpetual.com.au/select-super-updates.aspx.

6. Features (must be completed)

Indicate which optional features you would like applied to your account	Frequency (if applicable)	
<p>Auto-rebalancing refer to page 31 of the PDS for details If no frequency is selected, quarterly will be assumed ▶ If you are investing in Perpetual Select Geared Australian Investment Option you must tick ‘Yes’ to the auto-rebalancing feature and complete the ‘Investment strategy’ column in section 7.</p>	<p>yes <input type="checkbox"/></p>	<p>quarterly (default) <input type="checkbox"/> half-yearly <input type="checkbox"/> yearly <input type="checkbox"/></p>
<p>BPAY (additional investments) refer to page 30 of the PDS for details</p>	<p>yes (default) <input type="checkbox"/> no <input type="checkbox"/></p>	<p>n/a</p>
<p>Investor Online Account Access refer to page 32 of the PDS for details ▶ you can access information about your account online</p>	<p>view & transact (default) <input type="checkbox"/> view only <input type="checkbox"/> no access <input type="checkbox"/></p>	<p>n/a</p>
<p>Adviser Online Account Access refer to page 32 for details Note: your adviser can access information about your account online</p>	<p>view & transact (default) <input type="checkbox"/> view only <input type="checkbox"/></p>	<p>n/a</p>

- For each optional feature you have elected, please ensure you have read and understood the relevant section in the PDS for that optional facility.
- If you have nominated an optional feature above, please ensure you fill out the relevant columns in the table in **section 7** completely.

7. Investment details

Please nominate the dollar amount or the portion of money you would like to invest in your selected Investment Options. If you don't nominate an Investment Option, your money will be invested in accordance to your current investment strategy.

Investment Options	Short code	Initial contributions			Savings plan (if applicable)	Investment strategy (additional applications & auto-rebalancing)
Conservative	SSCOST	\$	or	%	\$	%
Balanced	SSBAST	\$	or	%	\$	%
Growth	SSGRST	\$	or	%	\$	%
High Growth	SSEQST	\$	or	%	\$	%
Geared High Growth*	SSGEQST	\$	or	%	\$	%
Cash	SSCAST	\$	or	%	\$	%
Fixed Income	SSFIST	\$	or	%	\$	%
Real Estate	SSPRST	\$	or	%	\$	%
Australian Share	SSAEST	\$	or	%	\$	%
Geared Australian Share*	SSGAEST	\$	or	%	\$ (max 50%)	(max 50%) %
Limited Share	SSLIST	\$	or	%	\$	%
International Share	SSINST	\$	or	%	\$	%
Total		\$	or	100%	\$	100%

*You must tick the box under 'Geared Investment Options' in Section 9 if you have selected this Investment Option.

9. Declaration and signature (must be completed)

I declare and agree that:

- I have read and understood the Product Disclosure Statement (PDS) and any relevant incorporated material for Select Super Plan and confirm I accept this offer in Australia
- all of the information provided in my application is true and correct
- If I have received the PDS from the internet or other electronic means that I received it personally or a print out of it, accompanied by or attached to this application form
- I have read, understood and agree to be bound by, any additional restrictions in the PDS and any incorporated material and I agree to be bound by the provisions of the Trust Deed (as amended from time to time)
- If applicable, in the case of contributions, that I have read and understood the contribution eligibility rules in the PDS and that I am eligible to make or have contributions made for my benefit and will notify the Trustee if I am no longer eligible
 - If I am claiming a personal tax deduction in relation to my contributions, I have:
 - not yet lodged my income tax return for the current year of income
 - not yet commenced a superannuation income stream based in whole, or part, on the contribution.
- I authorise Perpetual to quote my TFN or exemption to the Australian Taxation Office (ATO).
- I authorise Perpetual to obtain information from the ATO regarding my superannuation account in relation to my TFN, PAYG or other superannuation tax-related matters.
- I acknowledge that neither the Trustee nor any other company in the Perpetual Group guarantees the repayment of capital or the performance of the Super Plan.
- If investing under the Savings Plan, I have read the Direct Debit Request Service Agreement and have completed sections 3 and 5.
- I acknowledge that commission may be paid to my adviser as set out in the PDS and section 8.

Geared Investment Options

(You must read and tick the box below if you have chosen to invest in the Perpetual Select Geared Australian Share and/or Geared High Growth Investment Option/s.

I have thoroughly read the ‘Understanding investment risk’ section on pages 8-10 of the PDS, ‘Gearing risk’ section on page 9 of the PDS and ‘Gearing policy’ section on page 10 of the PDS. I understand the greater risks associated with my selection of the Geared Australian and/or Geared High Growth Investment Option/s and that it has a suggested investment timeframe of seven years or more.

I acknowledge and accept that, if the value of my investment in the Geared Australian Share Investment Option has risen above or fallen below my nominated percentage allocation (or the default percentage allocation if I do not make a nomination) at my nominated review date (or the default frequency if I do not make a nomination) it will be automatically rebalanced to my nominated percentage allocation (or default percentage allocation) across my investments. I acknowledge that the buy/sell spread will apply to this rebalancing transaction.

signature of investor	<input style="width: 95%;" type="text"/>	date	<input style="width: 10%; height: 20px;" type="text"/> / <input style="width: 10%; height: 20px;" type="text"/> / <input style="width: 10%; height: 20px;" type="text"/>
print name	<input style="width: 100%; height: 20px;" type="text"/>		

<p>Important notes:</p> <ul style="list-style-type: none"> ▪ If signing under power of attorney, the attorney certifies that he or she has not received notice of revocation of that power. The power of attorney, or a certified copy, must be sent to Perpetual, if not previously provided. ▪ Perpetual has the absolute discretion to accept or reject any application. ▪ A business day is a working day for Perpetual in Sydney. 	<p>Final checklist</p> <p>Have you:</p> <ul style="list-style-type: none"> ▪ Completed all sections of your application form? ▪ Signed your application form? <p>Please send your completed application form to:</p> <p>Reply Paid 4171 Perpetual Select Super Plan GPO Box 4171 Sydney NSW 2001</p>
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